FMS People Tools & Oracle Upgrade

User Orientation

2010

Contents

PEOPLESOFT FINANCIAL SYSTEMS UPGRADE
TO PEOPLETOOLS 8.50 & ORACLE DATABASE 10g

1. Background

The Lab's PeopleSoft financial systems, FMS, TREX and eBuy, are comprised of 3 components: applications, tools and a database. Periodically, the vendor releases newer versions of these components. The IT Business Systems Department and the Office of the CFO jointly evaluate and upgrade the system with newer versions of these components as necessary.

Effective June 14, 2010, the PeopleSoft financial systems well be upgraded to the latest tools and database versions (People Tools 8.50 and Oracle database 10g). While these upgrades will not change the functionality of the system, there will be minor changes to the look and behavior of the system. In addition, as explained below several new/enhanced features have been added.

2. Reasons for the current upgrade

- Enable enhanced features in latest release of People Tools (8.5)

- Prepare for future enhancements in the PeopleSoft application software

- The current Oracle database version (9i) is at the end of its life cycle

- Take advantage of data processing improvements available in Oracle database version 10g

3. Purpose of this document

- To list out major impacts of the upgrade, and significant changes/ new features

- To give an initial orientation to the system users (Resource Analysts, eBuy, TREX users) about the common new features/changes, that are apparent and are immediately seen after the upgrade

- This is not a training document, but is meant to highlight and provide an introduction to the changes that will be noticeable to the user.

4. Major Impacts of the Upgrade

- No changes to the menus, pages and existing functionality or procedures

- Possible improvements to system performance

- Opportunities to explore new features/benefits, after the upgrade

- Type ahead 'delivered' functionality impacts the Planning System employee search and TREX location search, which is explained in detail, later in the document

- System response time to 'type ahead functionality' might be slower than user expectation. There is an option to turn-off the functionality, explained later

5.   *Overview of New Features/Changes*

- Minor changes in the navigation to the menus and pages to all FMS applications, except to eBuy. There will not be any changes to eBuy navigation

- Minor changes to the look of the FMS application

- Partial page refresh – faster screen display times

- Type-ahead in prompt fields – matches are immediately displayed while typing

- Modal search windows (experienced as a separate pop-up page on top of the current page) – faster refresh times

6.   *New Features/Changes*

6.1. 1. Minor change in the navigation to menus and pages:

Current tools version:

- When a user first log into the FMS, he/she sees the list of menus on the left. The number of menus each user sees varies depending on each user's access rights
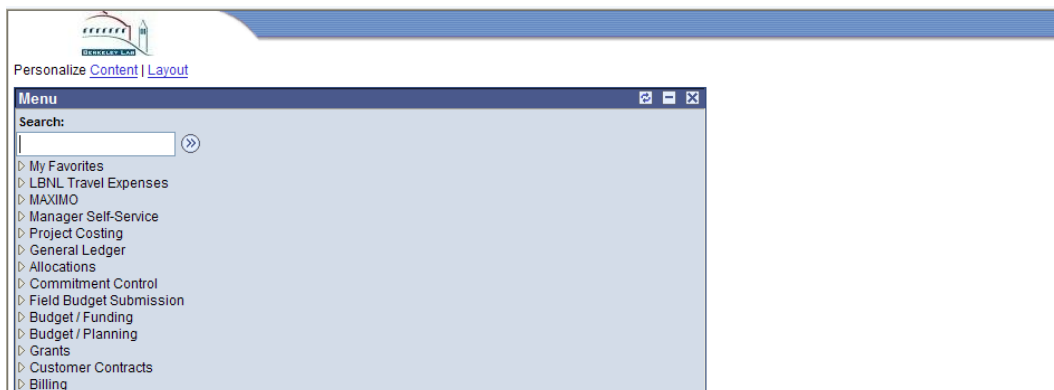
- When a user clicks on a particular menu, it gets expanded with the list of folders under it, on the left. System also displays a more expanded the list of folders and sub-folders/pages within each folder, on the right

- Sample screen shot of General Ledger menu, when a user clicks on General Ledger menu, after logging into the system
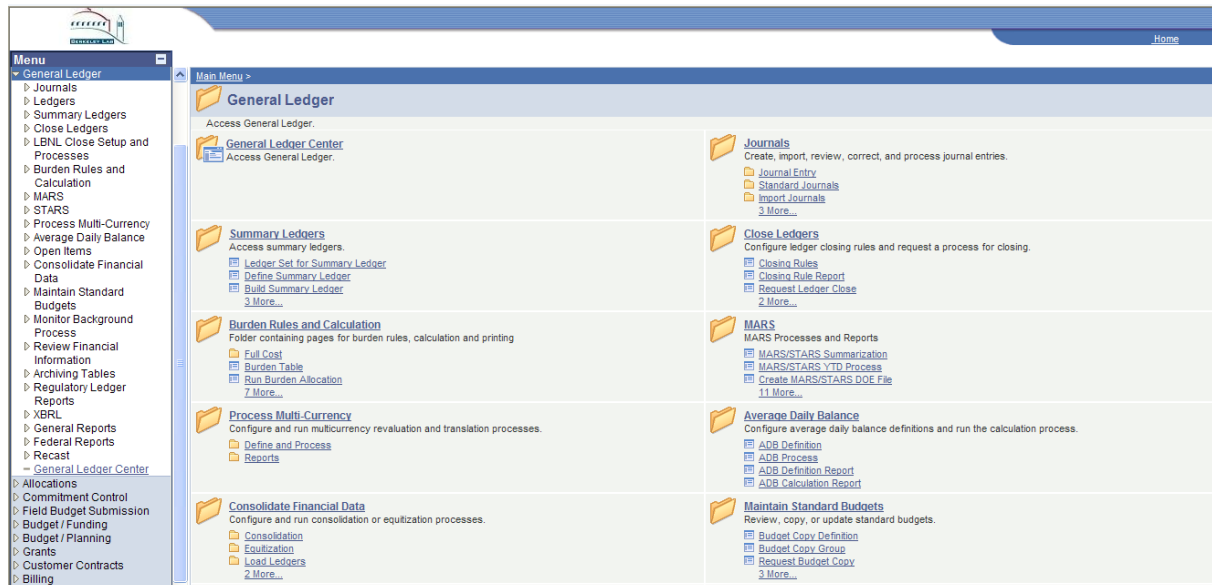

- When a user clicks on a particular folder, it gets expanded with the list of sub-folders/pages within the folder, on the left side. System also displays a more expanded list o sub-folders/pages within the folder selected, on the right
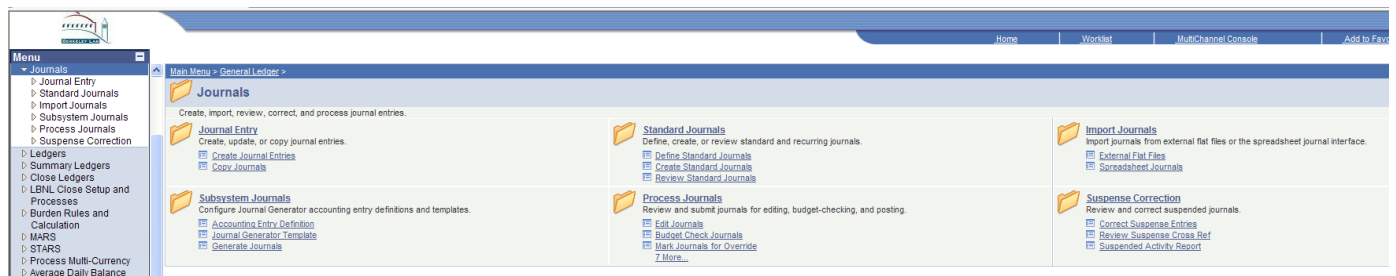
- The user can continue expanding a folder displayed on the left side or on the right side, by clicking on it, till he/she navigates the required page

- Sample screen shot of Create Journal Entry (Resource Adjustment) page from the Journal Entry folder

- The user could keep navigating to required page by clicking on the appropriate folder on the left side menu and drilling through it

Upgrade tools version:

- When a user first log into the FMS, he/she sees the list of menus on the left, similar to the older version. The number of menus each user sees varies depending on each user's access rights.
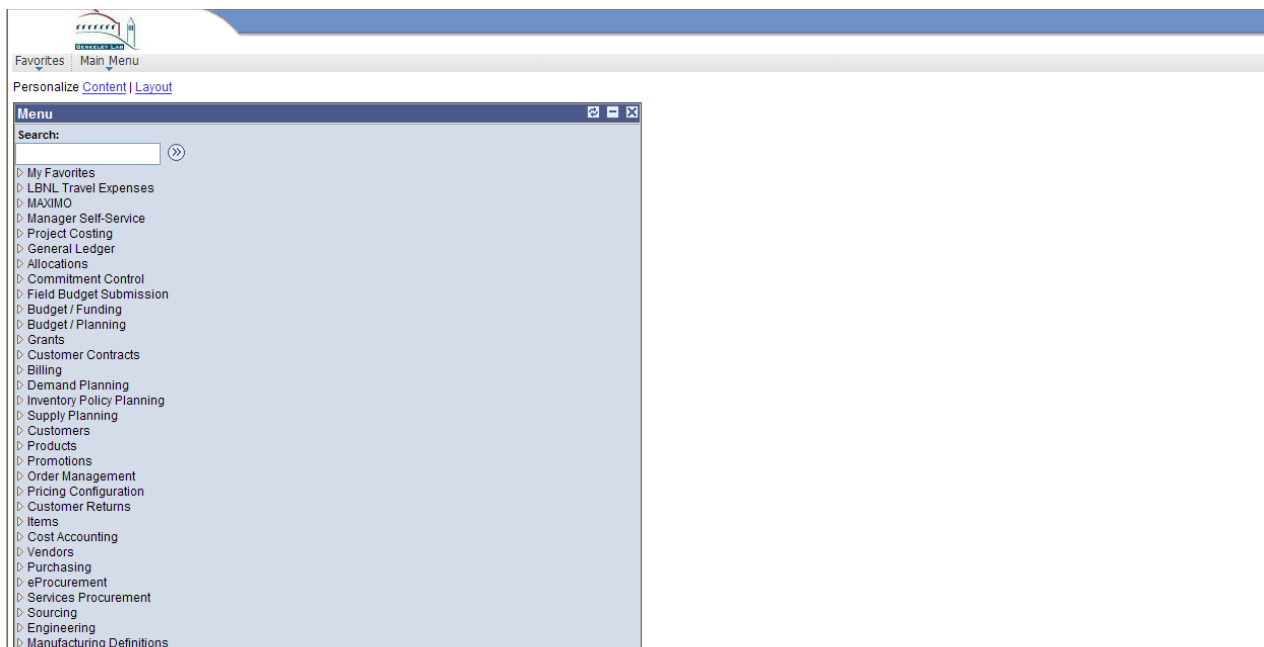
- When a user clicks on a particular menu, the left side menu gets hidden and system displays a list of folders and sub-folders/pages within the folder selected.

- Sample screen shot of General Ledger menu, when a user clicks on General Ledger menu, after logging into the system.
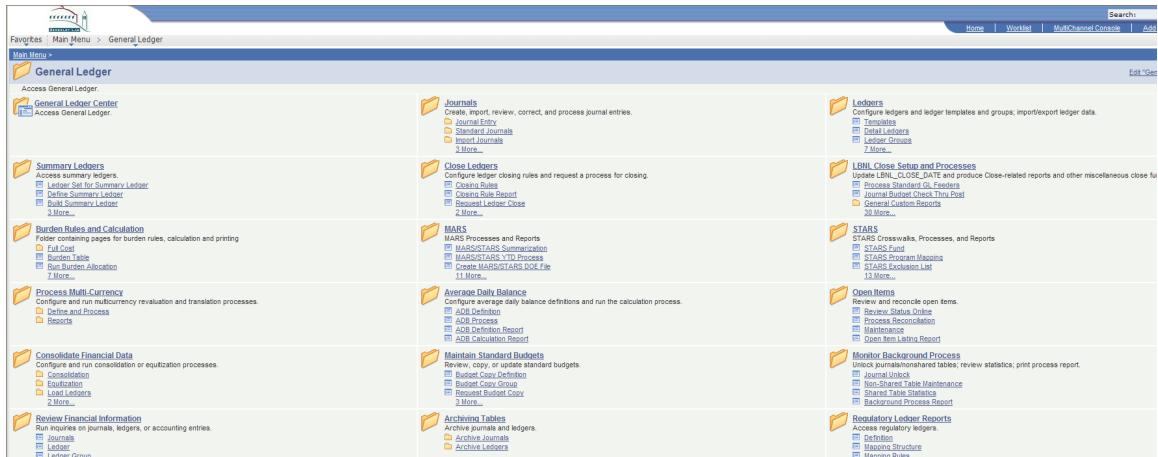
- The user could keep navigating to required page by clicking on the appropriate folder and drilling through it.

- User could view the entire list of folders (menus under the older version) he/she has access to by clicking on the 'drop-down' arrow under 'Main Menu' on the top left corner of the screen.
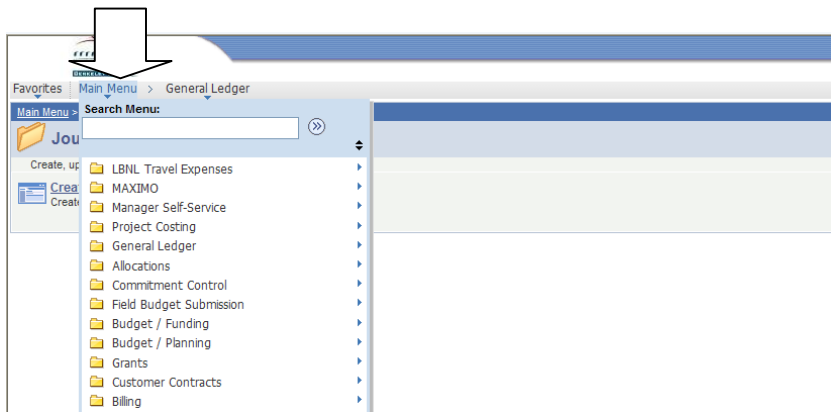
- User could further view the entire list of sub-folders by just placing the computer mouse over the folder he/she is interested in

- Sample screen shot of sub-folders under General Ledger
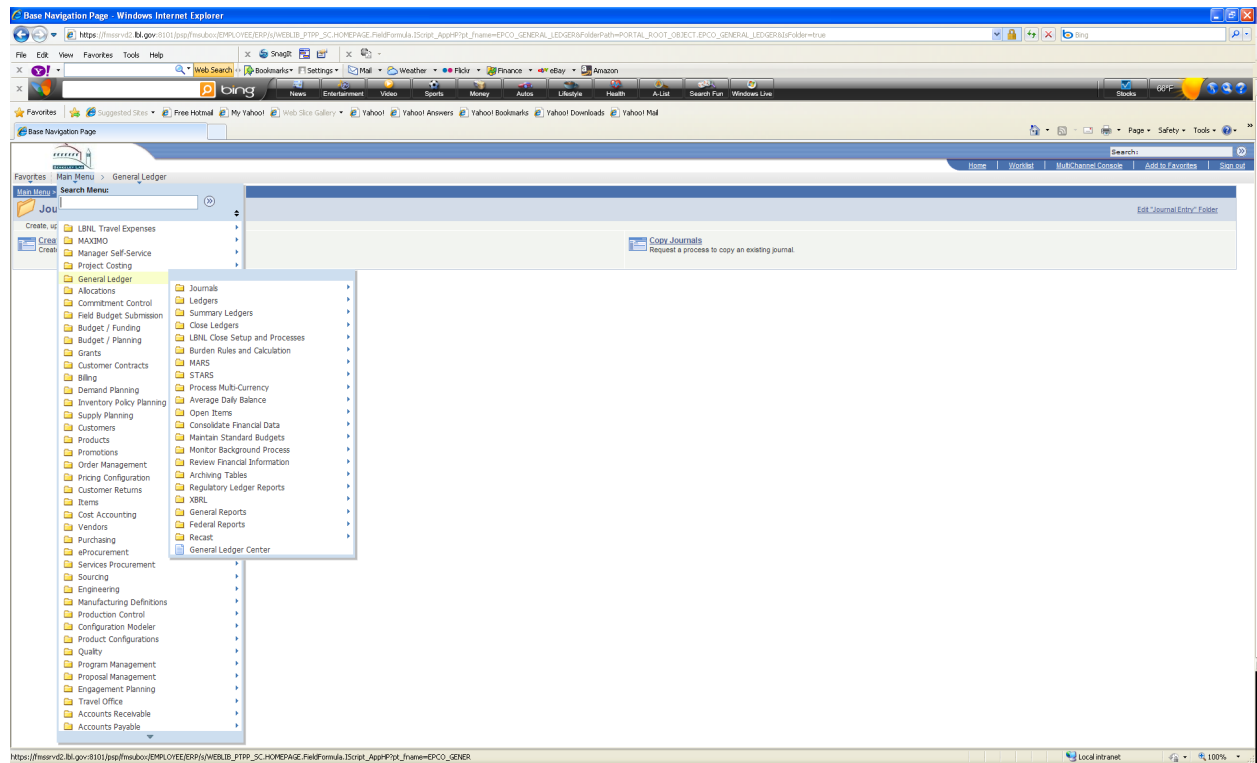
- The user could further keep on drilling down the entire hierarchy of folders and sub-folders till he/she goes to the lowest level page, by just placing the computer mouse over the appropriate sub-folder/sub-folder/page

- Sample screen shot of drill down through the hierarchy of General Ledger, till the page 'Create Journal Entries'.
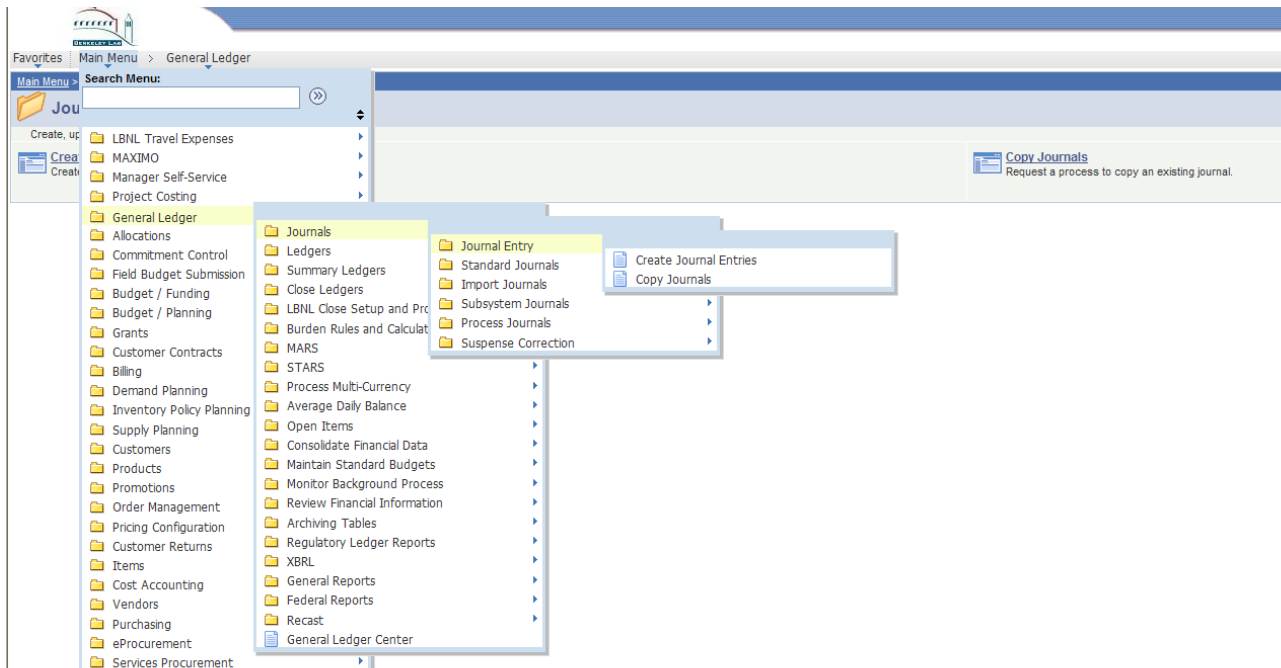
- User can then click on the actual page to open it up and start entering data or initiate a process.

- Sample screen shot of Create Journal Entry (Resource Adjustment) page, navigated from: General Ledger-Journals-Journal Entry is shown below. Once the user is on an actual page, all menu items/folders are hidden. However, the user can navigate back to sub-folders or folders or to the main menu by clicking on the appropriate drop down arrow as shown.
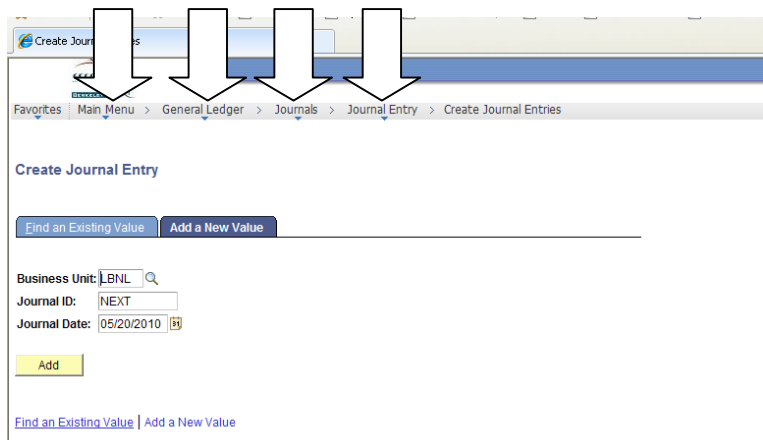
- User could always go back to the left side menu structure (like the older version of tools) by clicking on 'Home' on the top right corner of the screen
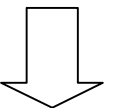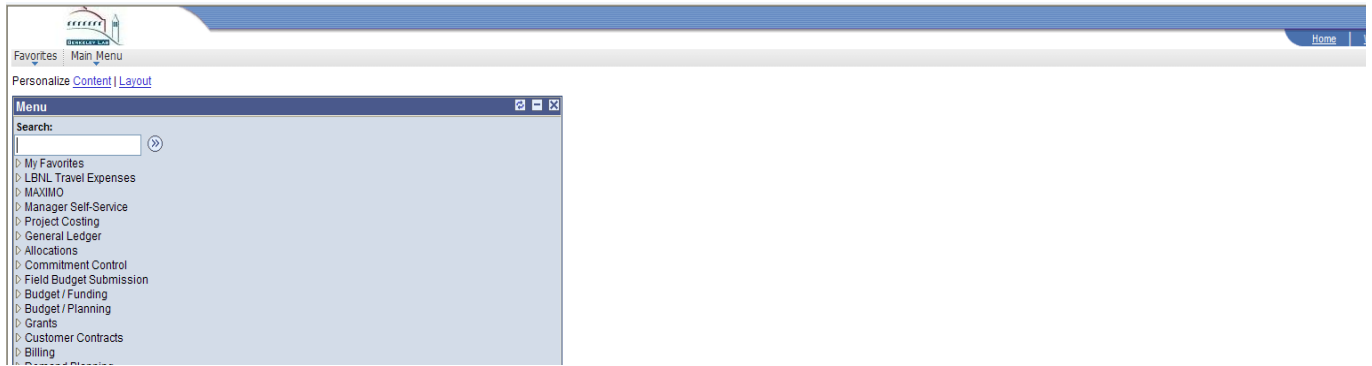
- User could take advantage of the 'Search' functionality by entering the key words under the 'Search box', which is now available in places: once on the top of the menu on the left side, and the second one on the top right corner of the screen. Sample screen shot given below

- **New Feature-Most recently used:** System shows the 5 most recently used pages under 'Favorites' as shown below

- **New Feature-Sorting the 'Folders/Menus' alphabetically:** Under the Main Menu, system shows the default folder sorting. Users can sort the folders to show up alphabetically, either ascending or descending by clicking on the sort option. The sort option is a toggle, if users click once, folders are sorted in ascending order, if users click second time, folders are sorted in descending order, and the third time click would make the folders sorted by system default.

Sample screenshot showing folders sorted alphabetically in ascending order
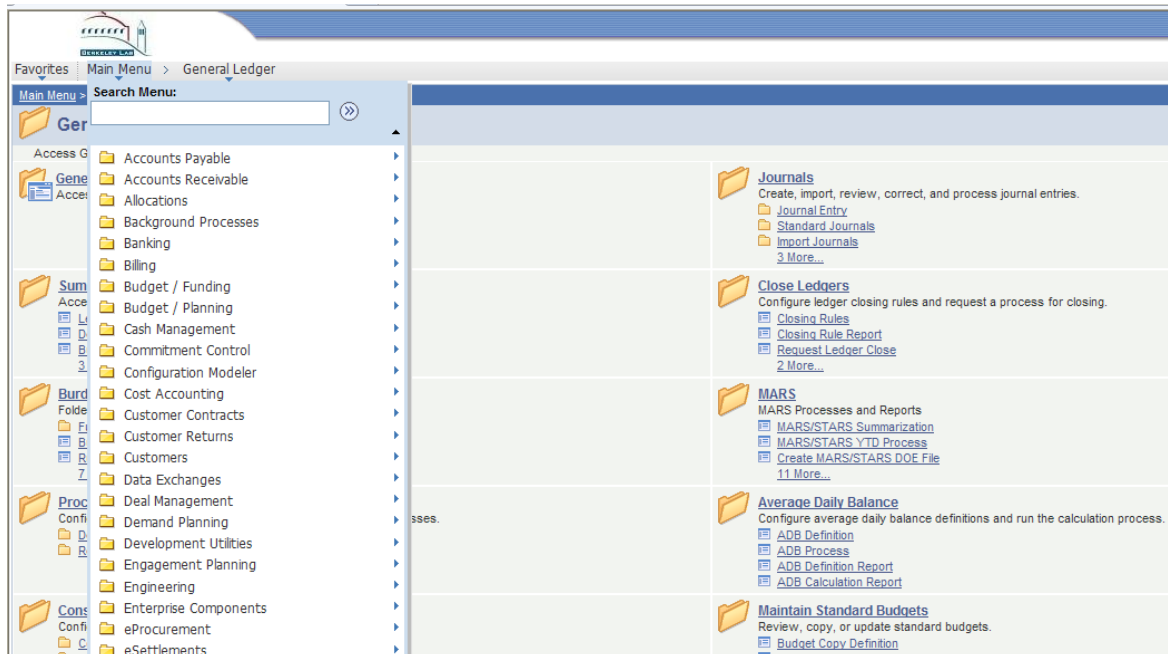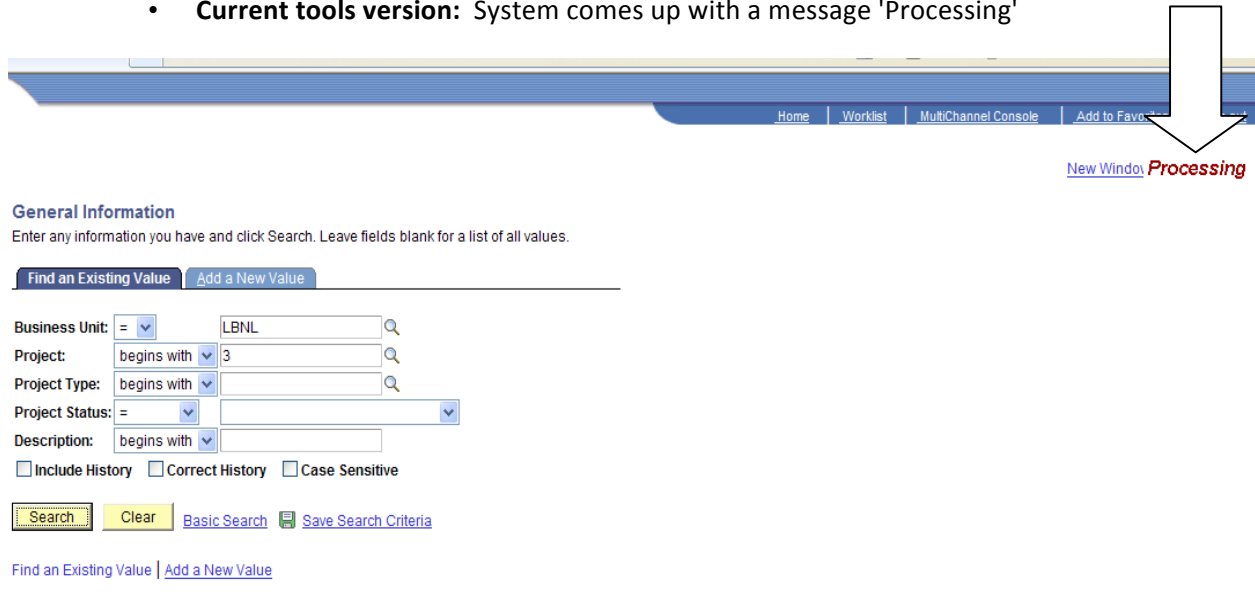
Sample screenshot showing folders sorted alphabetically in descending order
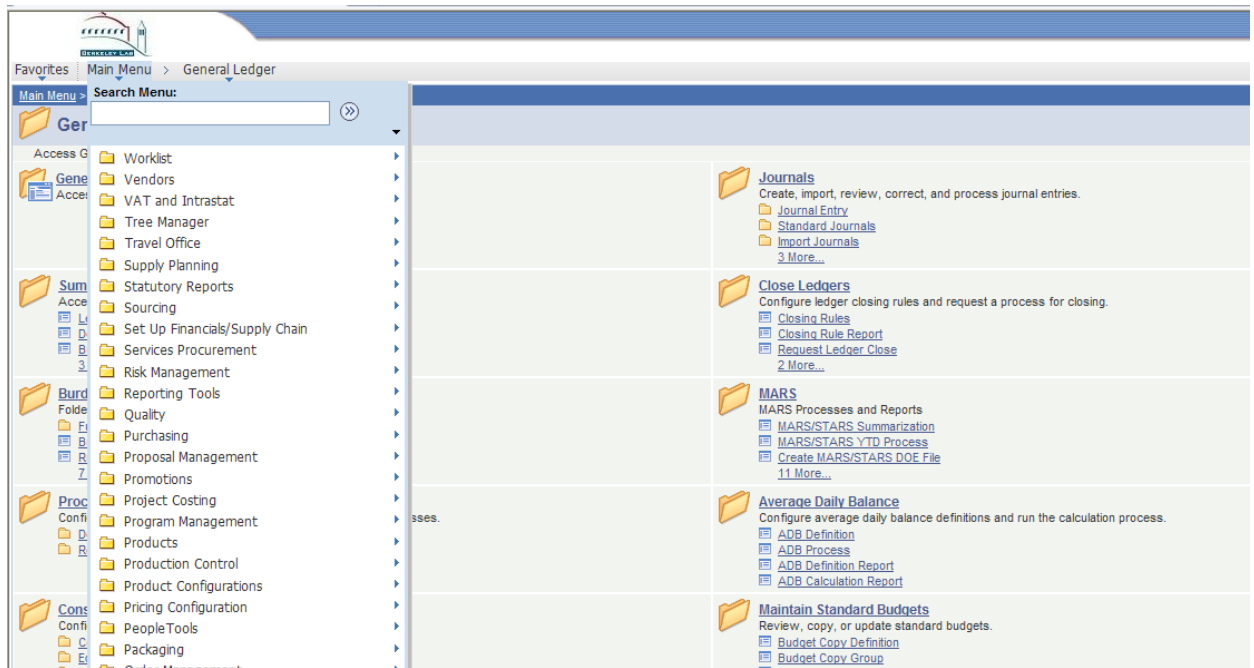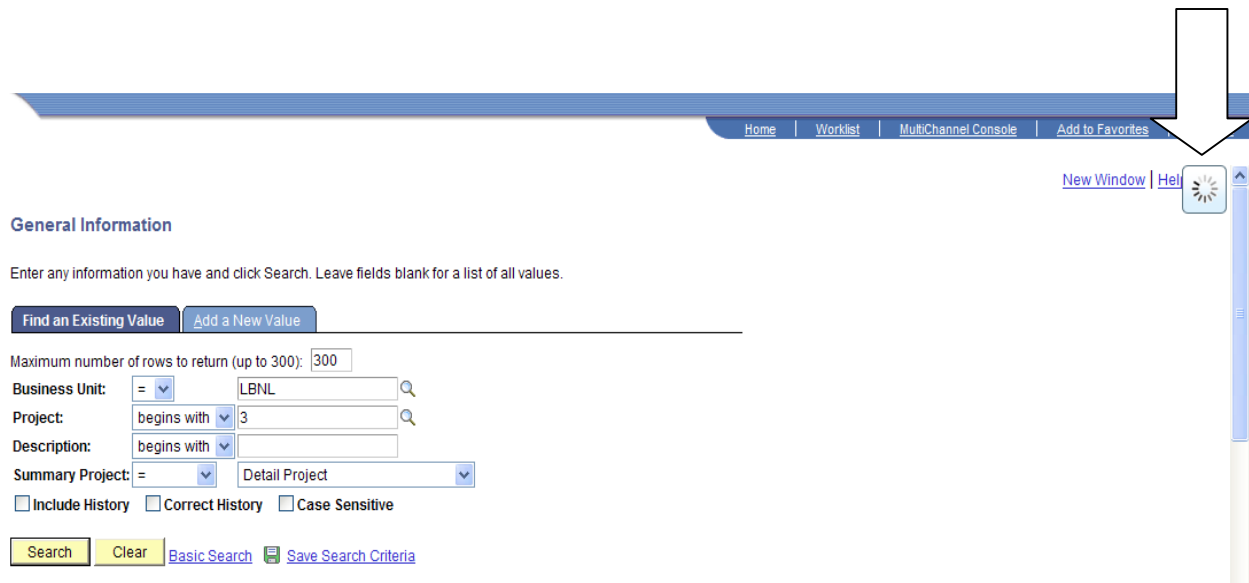
6.1. 2. Minor change to the look of the application

- **'Processing status' indicator:** When the system is searching for a record or executing a process.

    - **Current tools version:** System comes up with a message 'Processing'

- Upgraded tools version: System comes up with a processing indicator.

6.2. New features

6.2.1. **'Enhanced Search' Option:** If the number of records based on a user provided search criteria results in more than 300 records, the system retrieves and displays only the first 300 records.

- **Current tools version:** There is no option to the user to further restrict the number of records within the 300 limit, unless additional search criteria are specified. (e.g. Search for projects with type =OHGA)

- **Upgraded tools version:** Option to further restrict the number of records to be retrieved by the system within the 300 limit, without specifying additional search criteria. (e.g. Search for projects with type=OHGA and limiting the number of records to first 100)

6.2.2. **'Type-ahead' in look-up/prompt fields (fields with an icon 🔍 next to them):** System displays the matches immediately, while typing

- **Current tools version:** Customized 'type ahead' functionality in limited areas in the Budget Planning System and TREX. The customized functionality, to search employees in the Budget Planning System and locations in TREX is going to be impacted by the upgrade, as explained later in the document.

- **Upgraded tools version:** Vendor delivered 'type ahead' functionality, which works for all look-up/prompt fields (fields with an icon 🔍 next to them)

Example 1: Project Search

Example 2: 'Account' on a Journal (Resource Adjustment) Line data entry screen

Example 3: Searching Purchase Requisitions by 'Requisition Name', for approvals.

Example 4: TREX-LBNL Trip- look up places (Business Location) starting with 'SAC'

6.2.3. Modal (separate pop up page) search windows -faster page refresh times

- **Current tools version:** Search under a field in a page takes users to a new page, wherein results of the search are displayed. The user has to select appropriate value from the results, system goes back to the original page where the user first started, and then refreshes the data.

- **Upgraded tools version:** Search under a field in a page takes users to a new pop-up page, wherein results of the search are displayed, leaving the original page in the background. The user has to select appropriate value from the results, and then system immediately refreshes the original page

- Example: Users searching for a project starting with '300' from the Project Set-up/General Information page, by typing in 300 and clicking on the look-up icon ' 🔍 '

- **Current tools version:** 2 separate pages, one where the search criteria were specified, and the second one with search results.

- **Upgraded tools version:** Pop-up page with results, on top of the original page

6.2.4. Process Log Retention-Option to Increase in the number of days

- **Current tools version:** Depending on the configuration, system supports to retain and view process logs up to 99 days. Though system supports up to 99 days, FMS was configured to retain history up to 45 days.

- **Upgraded tools version:** Process logs could be retained, and viewed up to 9999 days (multi-year). The enhanced capability could be configured globally for all processes or customized to individual process.

6.2.5. Enhanced search options for viewing 'Process logs' under Process Monitor

- **Upgraded tools version:** Additional option of searching process logs by a 'Date Range'

6.2.6. Query Drill down capability
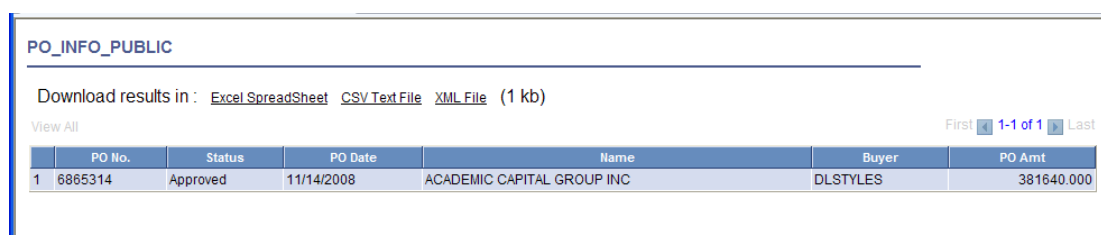
- **Upgraded tools version:** In the upgraded tools version, there is an option to drill down from a query to another query. Given below is an example of drilling down from an AP Voucher/Invoice query to the PO details query.

- Query results showing the AP Invoice/Voucher activity:

- Drill-down results on a PO i.e., by clicking on one of the PO's from the above result set, following PO details are displayed.

7. Turning- off 'Type-ahead' functionality

- If for some reason, a particular user does not like the new type-ahead feature, he/she can turn it off by customizing the personal settings. Each user has the ability to turn on/off certain features of PeopleSoft, including type ahead.

- The default setting for 'type ahead' is "Yes". 'Turning-off' instructions are given below.

- Navigate to the menu: 'My Personalizations', near the bottom of the menu structure

- Click on the yellow button ' Personalize User Options' next to the option 'Navigation Personalizations'

- System brings up the following screen, wherein the default value under 'Type Ahead' (last field on the page) is set to 'Yes'.

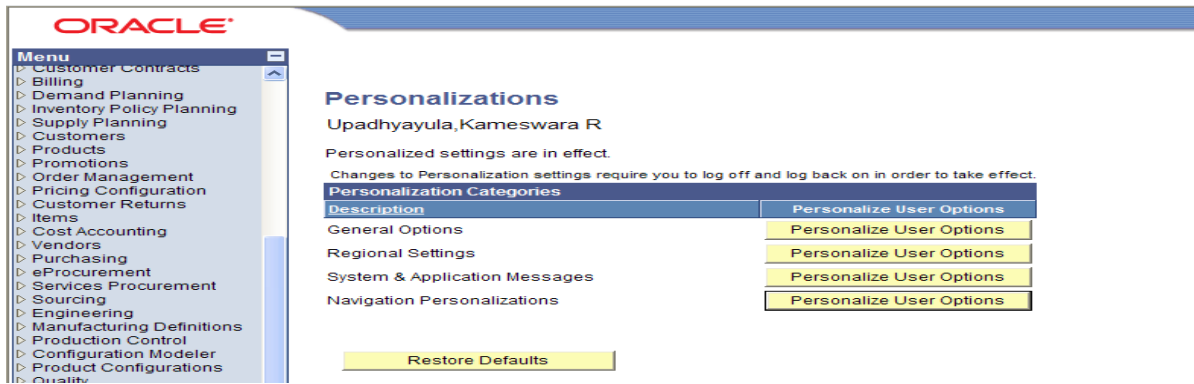- Override the default value by clicking on the drop down list under the column ' Override Value' and selecting 'No'.

- Once the override value changed to 'No' and clicking on 'OK', system comes up with the following message.

- Click on 'Return' to confirm the change, and to go to the 'Personalizations' page.

- Screen shot of the page after turning off the 'type ahead' feature is given below.
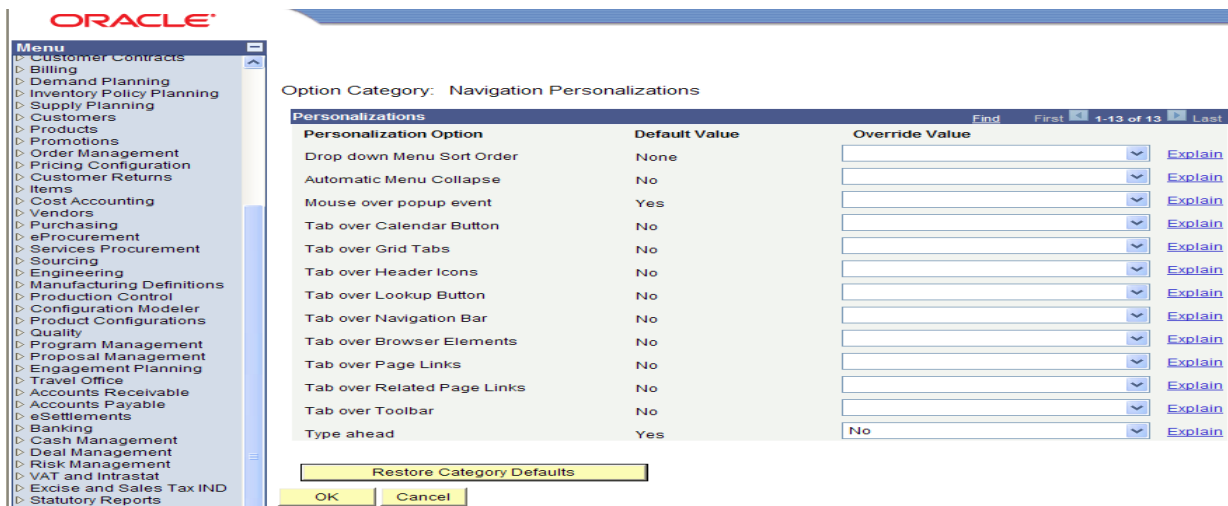
Notes:

1. Changes to the default setting are specific to the user, and apply to all modules

2. The feature can be 'turned on' again by setting the 'Override Value' back to 'Yes'

8. Impact to the Planning System & TREX-'Type-ahead' functionality

8.1.   Planning System-Employee search

- **Current tools version:** Customized type-ahead feature allows users to search employees by:

  a) Last name

  b) First name

c) Employee id.

- **Upgraded tools version:** Under the upgraded version, users can search employees only by 'Last Name'. Search by 'First Name' and 'Employee Id' will not work.

8.2. TREX-Location search

- **Current tools version:** Customized feature allows users to search for all cities within a state or country by typing a comma (,) and the state or country code

- **Upgraded tools version:**

1. Under the upgraded version, the search does not work if user types in a comma (,) followed by the state or country code.

2. It works only if:

a) The user types in the wild card (%) followed by a comma (,) followed by a state/country code (e.g. %, CA), and clicks on the search/look-up button 🔍 in the field: 'Business Location'. System displays the search results in a separate pop-up window as shown below. Note that the field: 'Description' on the pop-up page automatically gets filled in with the search criteria entered by the user.

b) Alternatively, the user clicks on the look- up button 🔍 next to the field 'Business Location', and in the pop-up window that comes up, types in the wild card (%) followed by a comma (,) followed by a state/country code (e.g.%, A) in the field: 'Description'